



# MeckACTs

## Cabinet Member Workplan

Neal L. Dixon  
Tax Collector



## Section 1: Annual Goals

# 1. Maximize Collections

**Goal Alignment** List your goal or the strategic priority that this goal will help achieve.

Goal OTC.1 – Maximize Collections

**Goal** Write a specific, measurable, attainable, relevant, and time-bound goal.

Maximize collections by administering the duties of Tax Collectors as described in NCGS 105-350 in service to the public and the local governments within Mecklenburg County. This will fulfill statutory responsibilities and achieve FY23 collection scorecard goals in a transparent and efficient manner.

### Rationale

The Office of the Tax Collector (OTC) collects real estate and personal property taxes for Mecklenburg County, the City of Charlotte, and the six surrounding municipal jurisdictions. Collection of county taxes represents approximately 60% of the budgeted revenue. The OTC also administers and collects gross receipts taxes that benefit the community.

**Action Steps** List the actions/events that need to take place.

- Employ all lawful means to collect ad valorem, gross receipts, privilege, and any other taxes charged by the governing bodies.
- Ensure that collections administration is conducted in a transparent way providing the public access to understandable information.
- Explore options to utilize technology and improvement opportunities to meet current and emerging customer demand.
- Comply with tax law, ordinances, policies, and audit requirements to fulfill statutory duties and achieve goals.
- Implement strategic initiatives in accordance with the FY 2023 – 2025 Strategic Business Plan.

**Evaluation Criteria** What does success look like? How will you know when this goal is achieved?

- Complete all action steps by June 30, 2023.
- Achieve FY 2023 strategic plan goals by June 30, 2023.
- Achieve the following scorecard goals and targets by June 30, 2023:
  - Customer Satisfaction Rating of 88%
  - Real Estate/Personal Property Collection Rate of 99.25%
  - Room Occupancy Tax Collection Rate of 99%
  - Prepared Food & Beverage Tax Collection Rate of 95%
  - Vehicle Rental/U-Drive-It Tax Collection Rate of 99.3%
  - Heavy Equipment Tax Collection Rate of 98%

- Employee Motivation & Satisfaction Index of 88%
- Employee Development Index of 88%

Section 1: Annual Goals

# 2. Marketplace Analysis and Total Cost of Ownership Analysis

**Goal Alignment** List your goal or the strategic priority that this goal will help achieve.

Strategic Priority OTC.1.1: Implement a Plan to Replace the Business Gross Receipts Tax Collections System

**Goal** Write a specific, measurable, attainable, relevant, and time-bound goal.

Partner with the County Manager’s Office (CMO), Information Technology Services (ITS) and Financial Services (FIN) to complete a Marketplace Analysis (MPA) and Total Cost of Ownership (TCO) Analysis in time for a FY2024 budget request.

**Rationale**

The legacy gross receipts tax system, BIZTAX, is to be replaced. The preparatory work to determine a specific long-term solution and the cost of ownership will be completed in FY 2023. Once determined, a technology reserve request will be submitted for consideration to fund a replacement beginning in FY 2024.

**Action Steps** List the actions/events that need to take place.

- OTC, FIN, and ITS will prioritize functional and non-functional requirements.
- Conduct a market assessment and perform product research (Survey/RFI/RFP if necessary) by Q3 to meet budget timeline.
- Solution Architecture Life Cycle (SALC) planning assessment will be performed including: conceptual, logical, physical, monitor, update, and transition phases.
- Custom build TCO that determines the dedicated product team resource needs, and the cloud platform costs (e.g., software licensing and data storage costs).
- Submit a technical reserve request based on the results of the MPS and TCO results.

**Evaluation Criteria** What does success look like? How will you know when this goal is achieved?

- Project stakeholders complete all action steps.
- Submit a clear replacement plan and detailed cost estimate through the technical reserve request process for consideration and possible commencement in FY 2024.

Section 1: Annual Goals

# 3. Department Equity Action Plan

**Goal Alignment** List your goal or the strategic priority that this goal will help achieve.

Accountable Government: Equity and Inclusion

**Goal** Write a specific, measurable, attainable, relevant, and time-bound goal.

Create a Department Specific Equity Action Plan

**Rationale**

An essential component to our County Equity Action Plan is alignment among our departments. Alignment is the bridge between strategy and execution. The criteria for implementing our Equity Action Plan requires that our systems, leadership, staff, and culture all align with the ideals of our plan and requires the specificity of our department’s functions. The development of our Department Equity Action Plans will help us; identify our individual department and enterprise responsibilities, create structure, process, and operational strategy at the department level, get clear on our departmental equity roles and responsibilities, and understand the experiences, skills, and competencies needed to execute on our equity plan.

**Action Steps** List the actions/events that need to take place.

- Complete FY20-22 County Equity Action Plan
  - Document progress on Existing County EAP
  - Participate in OEI Listening Session and complete the Equity Needs Assessment
- Meet with Chief Equity & Inclusion Officer to Review and Develop Department Equity Action Plan
- Create or Re-Establish Department-Specific Equity Action Team in alignment with OEI Sequencing
- In partnership with the Office of Equity & Inclusion, create department-specific equity vision, align department goals and objectives to the Equity Action Plan and identify equity-centered outcome measures

**Evaluation Criteria** What does success look like? How will you know when this goal is achieved?

FY20-22 County Equity Action Plan Completed and Progress Documented

Department Equity Action Plan Completed

Department re-establishment or creation of Department Equity Action Team in alignment with OEI Sequencing

